

# 2012 Member Needs & Satisfaction Survey Methodology

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*Synopsis prepared by Brian Doyle, SAA Director of Member and Technical Services  
August 2012*

In October 2011, SAA contracted with Indiana-based Association Metrics<sup>1</sup> to conduct a member needs and satisfaction survey between January 17, 2012, and February 6, 2012. Of 6,134 eligible participants, 2,151 members participated for a response rate of approximately 35%. As stated in the consultant's summary report,<sup>2</sup> the objectives of the study were:

1. To better understand which benefits and programs members value.
2. To understand why major segments of members belong to SAA; to determine SAA's mix of loyal, neutral, and vulnerable members; to determine which member benefits are being underutilized; and to measure the performance of SAA's programs.
3. To identify where SAA can achieve the greatest increase in retention and non-dues revenue for its efforts.

Association Metrics presented its summary report to the SAA Council via teleconference in May 2012. Given the volume of information in the 209-page document,<sup>2</sup> the consultant focused attention on project methodology, benchmark findings, and how to read and/or interpret the survey results. These main points are summarized below.

## **"Top Box" Methodology**

Many questions presented in the survey asked respondents to rate their satisfaction with some SAA product, service, or activity according to a five-point Likert scale. For example:

*What overall rating would you give to SAA's individual member benefits?*

1 – Poor; 2 – Fair; 3 – Good; 4 – Very Good; 5 – Excellent

Responses to such questions are displayed in the summary report as top 2 scores (a method sometimes referred to as "top box"<sup>3</sup>) rather than as average ratings. Conceptually, a top 2 score can be thought of as the percentage of respondents who gave an A or B rating for a particular product, service, or activity. Items that do not achieve a minimum performance rating of 70% should be considered for improvement efforts. The advantage of top-box reporting is that it helps reveal simple patterns in complex data. Data analysis can be made stronger when frequency distributions are also taken into consideration. Such a report is also available for review: <http://files.archivists.org/membership/surveys/saaSurvey-2012-FreqDistributions.pdf>.

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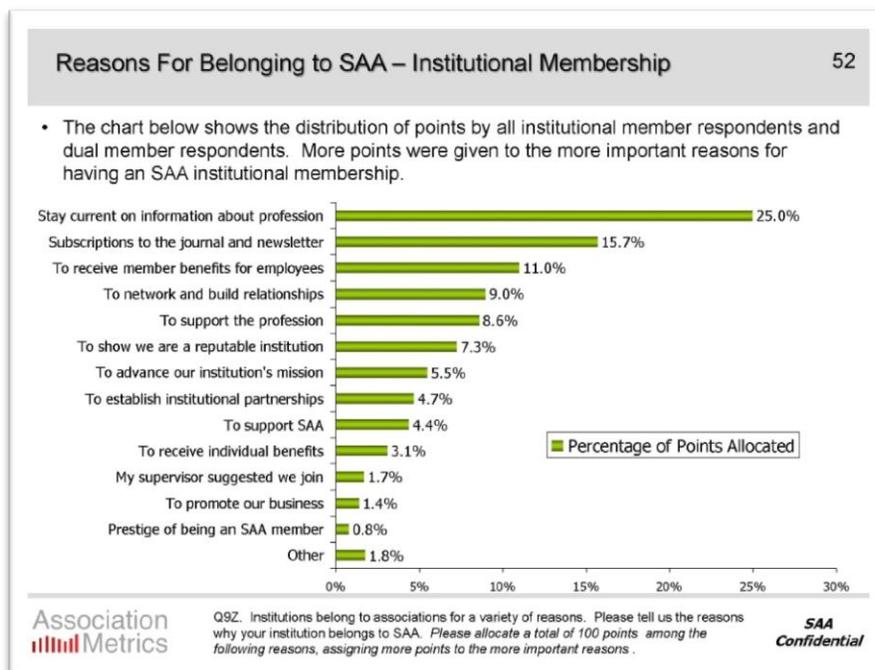
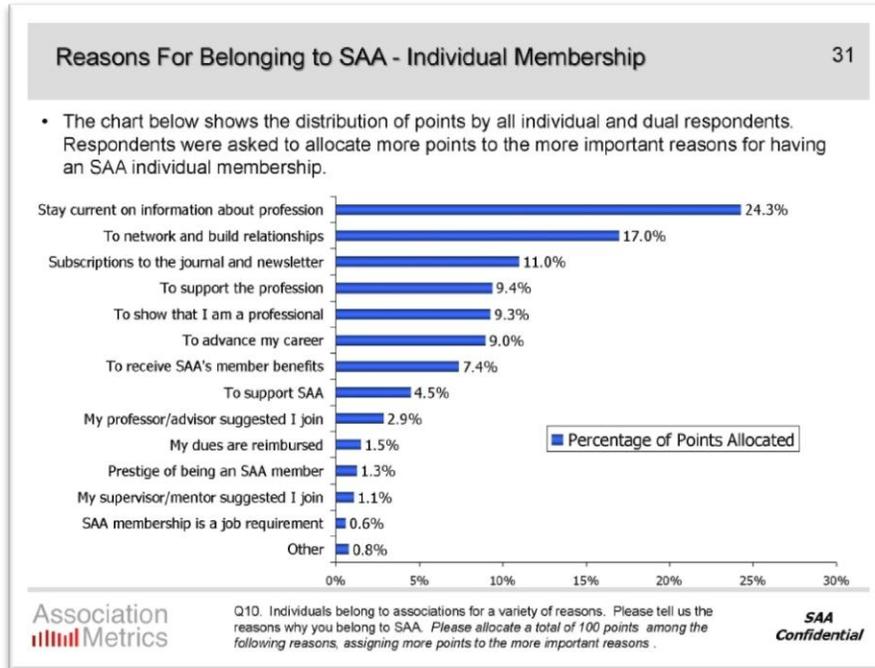
<sup>1</sup> <http://www.associationmetrics.com>

<sup>2</sup> <http://files.archivists.org/membership/surveys/saaMemberSurvey-2012r2.pdf>

<sup>3</sup> <http://marketresearch.about.com/od/market.research.surveys/a/Scoring-And-Reporting-In-Surveys-Research.htm>

## Benchmark Findings

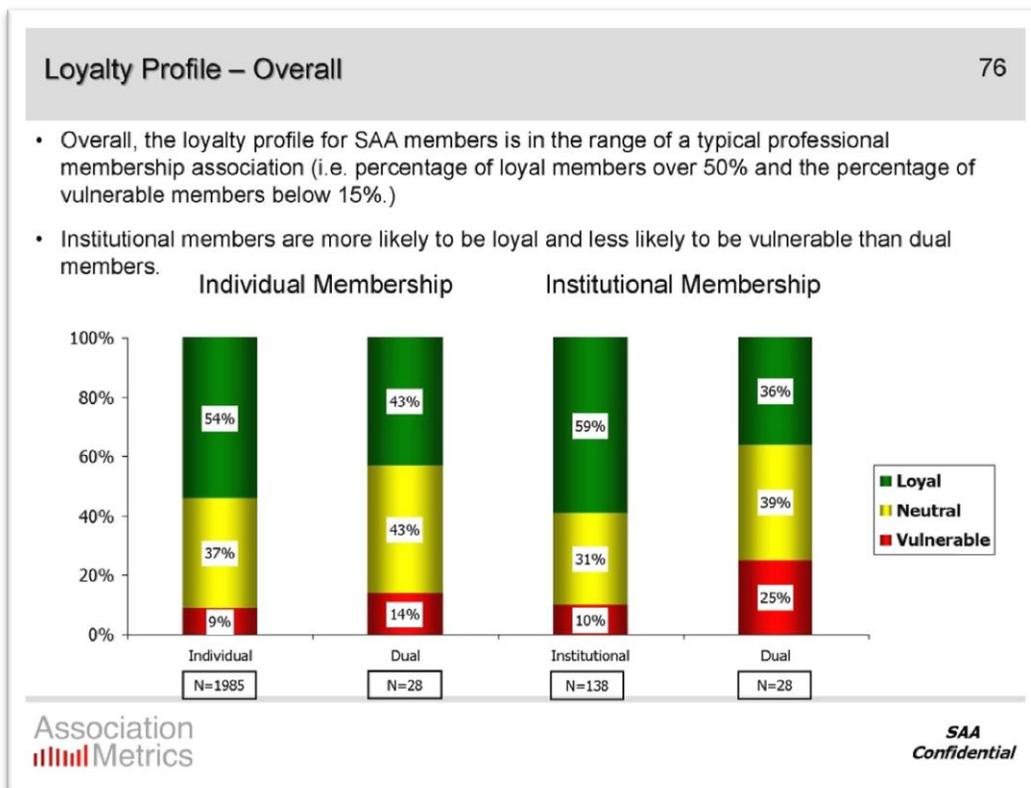
Slides 31 and 52 depict the reasons that members belong to SAA. Analysis of differences between member segments suggests that associate members place relatively more value on receiving information and publications than do full individual members. Student members place relatively more value on career advancement.



Slide 76 displays the overall “loyalty profile” of SAA members, which many organizations use as a baseline over time to assess performance. Within the section on loyalty, additional analysis suggests that the following types of members are likely to be more loyal to SAA:

- Members who have participated in continuing education programs;
- Older, retired, and long-time members;
- First-year members; and
- Members whose dues are reimbursed.

The consultant pointed out that these findings do not imply cause and effect—only correlation.

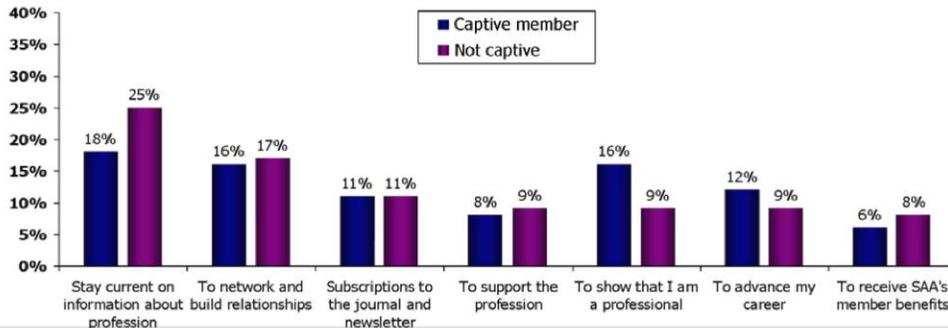


Slides 104 and 105 (next page) display differences among so-called “captive members”—i.e., members who are likely to renew but who rate the overall value of SAA as marginal or poor. According to the consultant, the incidence of captive membership typically ranges between 0% and 5% and tends to be higher among associations that provide certification and/or other benefits that are required to practice in the profession. Approximately 6% of SAA individual members and 7% of institutional members fall into this category. Analysis reveals that captive members belong to SAA for different reasons. They place relatively less value on staying current on information about the profession. Individual captive members place more value on career advancement and showing that they are professional. Institutional captive members place more value on showing that they are reputable and receiving journal subscriptions.

## Top Reasons For Individual Membership – Captive Members

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- Individual members who are captive differ somewhat from other members in their reasons for belonging to SAA.
- Captive members are more interested in self-promotion - placing a higher priority on belonging to SAA to show that they are a professional and to advance their career.
- Conversely, non-captive members are more interested in self-improvement - placing a higher priority on staying current on information about the profession.



Association  
Metrics

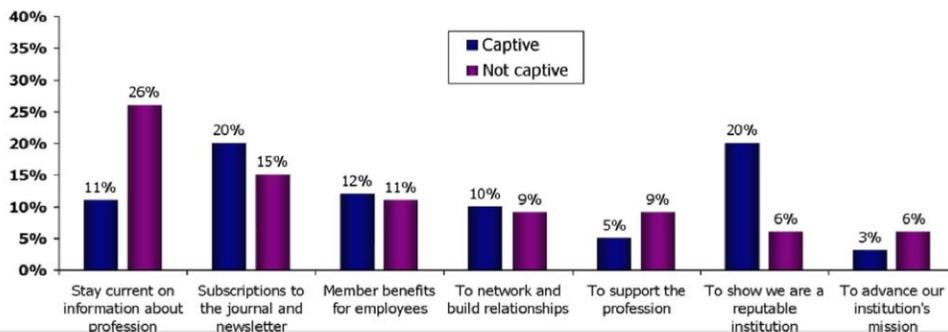
Q10. Individuals belong to associations for a variety of reasons. Please tell us the reasons why you belong to SAA. Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons.

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## Top Reasons For Institutional Membership – Captive Membership

105

- Institutional members who are captive also differ slightly from other members in their reasons for belonging to SAA.
- Captive members are more interested in promoting their institution - placing a higher priority on belonging to SAA to show that they are a reputable institution and getting periodical subscriptions.
- Conversely, non-captive members are more interested in self-improvement (placing a higher priority on staying current on information about the profession) and supporting the profession.



Association  
Metrics

Q9Z. Institutions belong to associations for a variety of reasons. Please tell us the reasons why your institution belongs to SAA. Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons.

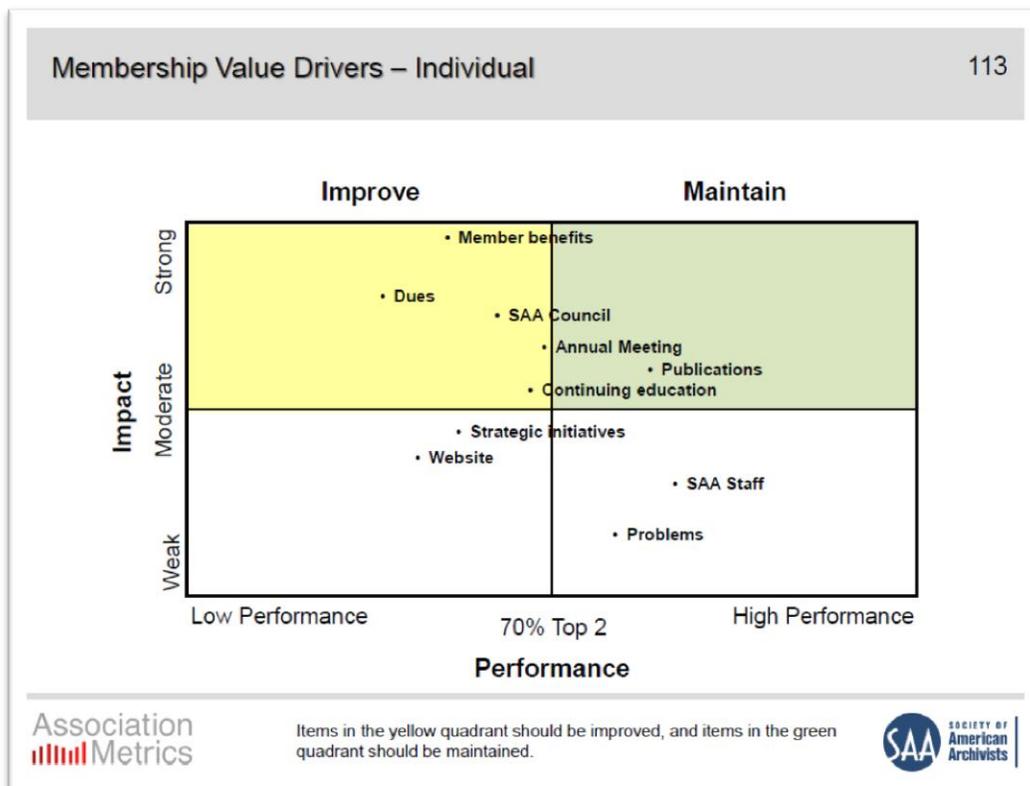
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## How to Read and Interpret Survey Results

Slides 113 and 114 are arguably the most important slides in the survey report. These charts display a two-dimensional “improve-maintain” matrix where:

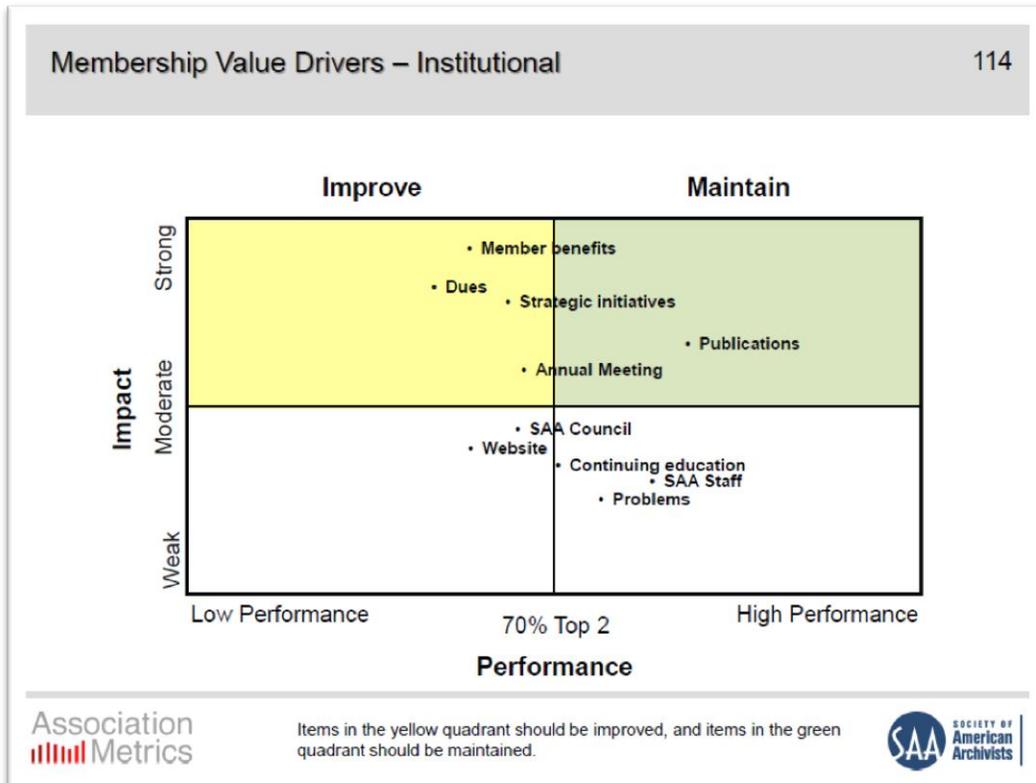
- The horizontal axis represents *performance* of the specified programs or areas of activity. Items plotted in the right half of the matrix should be regarded as performing well.
- The vertical axis represents *impact* vis-à-vis overall member value—i.e., to what degree does high or low performance in the area correlate with respondents’ general satisfaction with SAA. Items in the top half of the matrix should be regarded as having high impact.
- This yields a three-fold analysis in which:

“Underperforming strong drivers, those that appear in the upper left (yellow) quadrant, should be considered for improvement. Items that appear in the upper right (green) quadrant are strong drivers of value and are currently performing adequately. Those items that appear in the bottom half of the matrix (white region) do not have a strong impact on value at this time. Improving any item in the lower half is not expected to have the same impact on membership value as improving any item in the yellow region.”



Therefore, according to Slide 115, to enhance individual member value SAA should focus its resources on improving performance (or the perception thereof) in the areas of: Member Benefits; Dues; SAA Council; the Annual Meeting; and Continuing Education.

According to Slide 116, to enhance institutional member value SAA should focus its resources on improving performance (or the perception thereof) in the areas of: Member Benefits; Dues; Strategic Initiatives; and the Annual Meeting.



Slides 117-200 drill into the various programs or areas of activity displayed on Slides 113 and 114. Each section, with the exception of Membership Dues and Problem Analysis, includes an improve-maintain matrix that identifies that program/area's own value drivers, as well as analyses of benefits awareness.

All slides are available for review in the survey consultant's summary report:  
<http://files.archivists.org/membership/surveys/saaMemberSurvey-2012r2.pdf>

Some sections also included additional questions at the request of program stakeholders:

- Quality of continuing education delivery formats.
- Likelihood of pursuing continuing education according to workshop topic and type.
- Desirability of opting out from print-copy distribution for *Archival Outlook* and *The American Archivist*.
- Prioritization of areas for improvement vis-à-vis SAA's communication technology.
- Ownership of or likelihood to own different types of Internet devices.
- Prioritization of areas for improvement vis-à-vis the Annual Meeting.
- Price tolerance for Annual Meeting Wi-Fi service and online programming.

Responses to these questions were *not* factored into the multivariate regression analysis that generated the improve-maintain matrixes.

**The consultant's conclusions and recommendations are presented on Slides 204-209.**